



## **POLICY FOR THE DISTRIBUTION OF ISO PUBLICATIONS AND THE PROTECTION OF ISO'S COPYRIGHT – ISO POCOSA 2012**

*as approved under Council Resolution 22/2012*

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### **1 Introduction**

This Policy brings together all of the conditions for reproducing, distributing and selling ISO publications, metadata and other works published by ISO. It also includes all of the provisions about copyright, and the exploitation of copyright, in all ISO publications and in national adoptions and national publications of ISO members that incorporate ISO intellectual property. It replaces ISO/GEN 20:2005 (ISO POCOSA 2005) and all its annexes, and ISO/GEN 9:2007. The conditions for the use and protection of the ISO trademarks (name and logo) remain, as described in the current version of ISO/GEN 31.

This Policy is based on the ISO Code of Ethics, the ISO Statutes and other decisions of the ISO Council and is binding on ISO and all ISO members. If any commercial or intellectual property issue arises that is not covered by this Policy or related documents, it will be referred to the Secretary-General.

This Policy does not affect any existing arrangements signed by the ISO Central Secretariat, or an ISO member, with third parties before the date decided by the ISO Council for its implementation, until the renegotiation of these contracts. Any difficulty in implementing this Policy should be reported to the Secretary-General who will assist on a case-by-case basis.

### **2 Definitions**

In this Policy, the following terms and definitions mean:

#### **ISO, we, us, our**

The International Organization for Standardization (ISO), a worldwide network of standards bodies. Our headquarters are in Geneva (Switzerland), where the ISO Central Secretariat is based.

#### **ISO members**

For the purpose of this Policy, ISO members are member bodies and correspondent members, and their publishing, sales and marketing companies provided that the member holds a majority of shares and/or is the controlling company. This does not include national distributors, under separate ownership, appointed by ISO members.

#### **CPSG**

ISO's Commercial Policy Steering Group.

#### **Copyright**

Rights owned by authors to exploit their literary, scientific and artistic works.

#### **Shared copyright**

Copyright shared between two or more parties, for example between an ISO member and ISO.

#### **ISO publications**

Include ISO standards, drafts and their official translations, ISO derived products, and ISO Central Secretariat products, as defined in Annex 1, in which ISO asserts copyright.

### **ISO standards**

Standards developed within the ISO standardization process in accordance with the procedures of the ISO/IEC Directives, including their amendments and technical corrigenda, at all stages of their development. The complete list and definitions of these deliverables are given in the ISO/IEC Directives.

### **Drafts**

Documents prepared by ISO Technical Committees, subcommittees, working groups and other technical bodies during the various stages of developing ISO standards, as defined in the ISO/IEC Directives. Drafts are protected by copyright and therefore this Policy also applies to them.

### **National adoptions**

National publications that are based on ISO standards, prepared in accordance with ISO Guide 21-1: 2005 and so contain ISO intellectual property, or endorsements of International Standards, where the International Standard has been given the status of a national normative document, with any deviations from the International Standard identified.

### **Other works**

Any type of creative works, other than ISO publications, developed by or under the supervision of the ISO Central Secretariat and that are copyrighted by ISO. These works may include, but are not limited to, training material, presentations, videos, the contents of ISO's web site.

### **Metadata**

A set of information elements, structured and compiled by ISO as a database, that help to describe or identify ISO publications. Metadata include titles, abstracts, editions, dates of publication and similar descriptive elements.

### **Third party**

Any organization or person other than an ISO member or the ISO Central Secretariat.

### **Licensee**

An ISO member or third party authorized by an ISO member or the ISO Central Secretariat to reproduce or otherwise use ISO publications.

### **National territory**

The country in which an ISO member's headquarters are located, including any of the country's territories outside its main boundaries.

### **National distributors**

Third parties appointed by an ISO member to distribute ISO publications in their national territory, or by the ISO Central Secretariat to distribute ISO publications in a particular territory.

### **Trans-national distributors**

Third parties the ISO Central Secretariat has appointed to distribute ISO publications in more than one national territory.

### **Distribution**

The dissemination of ISO publications.

### **3 Guiding principles**

#### **3.1 Distributing ISO publications**

The main objective of ISO and ISO members is to achieve the widest possible distribution and use of ISO publications throughout the world that is consistent with the protection of ISO's copyright and the ISO business model.

ISO's funds derive from the dues and contributions of the ISO members and from the sale of ISO publications and services, in accordance with the ISO Statutes and Rules of Procedure. It is therefore crucial that the ISO business model supports the standardization process and the development of standards at both national and international level.

ISO members have different legal statuses and business models. For some members the exploitations rights granted by ISO, as defined in Clause 5.1, are not important to their own funding, but these rights are vital to other members, and are crucial to maintaining the standardization system as a whole. For this reason, ISO publications and national adoptions, or parts of them, must not be made available to third parties free of charge unless it is explicitly authorized by ISO Council or is for the purposes of further standards development, as explained in Annex 3.

#### **3.2 Shared responsibilities**

There can only be one ISO member in each country. An ISO member must carry out its commercial activities in a way that does not adversely affect the exploitation rights of other ISO members in their own national territory.

#### **3.3 Governing law and settling disputes**

Except as otherwise agreed, the laws of Switzerland govern all matters between ISO members and ISO concerning POCOSA.

Any dispute between two or more ISO members concerning this Policy must be referred to the Secretary General, who will work with them to try to reach a settlement. If the dispute is not settled at that stage, it will be referred to mediation and then arbitration. The parties involved in the dispute must at all times make every reasonable effort to reach a mutually acceptable settlement.

### **4 Protecting ISO intellectual property**

#### **4.1 Objectives**

ISO publications and other works, including their entire content, together with any national adoptions, are works constituting individuality and originality, and are therefore copyright-protected under the law of Switzerland, which is the country of origin of the works.

This copyright protection is very important. It allows ISO members and ISO to control the use of the content in ISO publications and national adoptions. It also ensures that their integrity and authority are not weakened, and that income can be derived from them. This is why our Code of Ethics states that ISO and all its members must make commercially reasonable efforts and take all appropriate actions to ensure the proper use of the ISO name, trademarks and logo and prevent unauthorized reproduction or distribution of ISO intellectual property in their countries.

## **4.2 Communication on copyright**

ISO members and the ISO Central Secretariat should take every opportunity to remind standards users and other parties that ISO publications and other works are protected by copyright and that this copyright will be enforced, if necessary, by legal means. They should also ensure that all legislative and regulatory authorities are regularly reminded that ISO publications are developed through a voluntary, consensus-based process and that their use is also intended to be voluntary. Regulators or legislators may make reference to ISO publications, or national adoptions of them, but this does not extinguish the copyright asserted by ISO. It is essential that the legal, administrative and judicial authorities in a national territory understand this, so that they do not mistakenly classify any ISO publications or national adoptions as official documents not protected by copyright.

To encourage the legal use of ISO publications and national adoptions, ISO members and the ISO Central Secretariat should offer end-users appropriate and easy access to these publications. This could be through facilities ranging from simple publication arrangements to sophisticated licensing and networking agreements. The ISO Central Secretariat can help ISO members negotiate such arrangements.

## **4.3 Copyright notices**

All ISO publications and national adoptions must carry a copyright notice in a suitable place that is clearly visible, together with an abbreviated copyright notice on each page, in accordance with Annex 2. This will continually remind users that these documents are copyright-protected and must not be reproduced without proper authorization. At the same time, the copyright notice will inform users how this authorization may be obtained.

## **4.4 Protection measures**

Each ISO member must make all commercially reasonable efforts as may be appropriate under the laws of its national territory to protect, and prevent the unauthorized use of any of ISO trademarks, logos, or the content of any ISO publications and national adoptions. ISO members should co-operate with their national political, legal and administrative authorities to help to enforce this Policy.

Each page of PDF versions of ISO standards and national adoptions must be watermarked to identify the actual purchaser or user. If necessary, this requirement can be met by using a watermarking tool prepared by the ISO Central Secretariat and available free of charge to all ISO members. ISO standards and national adoptions distributed in other electronic formats must also be watermarked in a similar way, wherever this is technologically possible.

When using public networks for distributing any ISO copyrighted documents, either in standards development or in standards distribution, the ISO Central Secretariat, ISO members and all participants in technical committees and subcommittees must take appropriate measures to make sure that these documents are only distributed and used in accordance with Annex 3.

## **4.5 Public policy and national laws**

ISO members must inform the Secretary General of any new laws, regulations or official decisions that could directly or indirectly affect ISO's copyright, as soon as they become aware of them.

# **5 Copyright ownership and licence**

In accordance with the ISO/IEC Directives, when material contributed for inclusion in an ISO standard is already subject to copyright, the right to copy and distribute the material must be

granted to ISO and its members, including the right to reproduce it in any other form or in any other works.

Except in the specific cases where rights are shared with ISO members or third-parties, ISO is the only copyright holder of ISO publications and other works and their associated metadata and therefore has the right to exploit them all over the world, in any format, at any time and to grant exploitation rights to ISO members and third parties.

### **5.1 Licences granted to ISO members**

ISO grants each ISO member a non-exclusive, transferable and unlimited licence giving them all exploitation rights in its national territory. These include for example the right to nationally adopt, distribute, reproduce, represent, broadcast, translate, sell, lease, lend and sub-license ISO publications and their metadata in accordance with this Policy.

The exploitation rights granted by this licence do not imply any transfer of copyright to members except in cases where a member translates an ISO publication, in which case the copyright in the translation is shared between ISO and that member.

The use of ISO metadata, as structured and compiled in a database by ISO, is strictly limited to ISO members, the ISO Central Secretariat and their respective appointed distributors.

When an organization ceases to be an ISO member, for whatever reasons, the licence and all exploitation rights are immediately and automatically withdrawn, including the right to distribute national adoptions or any products based on them. ISO members needing, as part of their obligations according to agreements with third parties, to continue to exploit their rights under the license according to this Policy have to refer to the Secretary-General to negotiate possible options.

ISO members that do not meet the terms of this agreement, or are not willing to protect copyright in ISO publications and other works, will be liable to sanctions, which may ultimately include expulsion from ISO.

### **5.2 Licensing or sub-licensing agreements with third parties**

ISO members and the ISO Central Secretariat may enter into licensing or sub-licensing agreements which allow third parties to exercise all or some of their exploitation rights. When issuing a licence or sub-licence to a third party, ISO Central Secretariat will consult with CPSG or seek the permission of ISO Council, as appropriate.

ISO members do not need the permission of the Central Secretariat to enter into one of these agreements but must ensure that they are in accordance with all the relevant provisions of this Policy.

## **6 Reproducing ISO publications, metadata and other works**

### **6.1 Reproduction by ISO members**

Provided that ISO copyright is adequately protected, the reproduction of ISO publications, national adoptions and ISO's other works is allowable in the following circumstances:

- a) Reproduction for internal use:** ISO members can reproduce ISO publications, free of charge, in their national reference libraries and for experts to use in developing further ISO standards.

- b) **Reproduction for sale:** ISO members can reproduce ISO publications, or parts of them, for sale in hard copy or electronic formats but they must meet the commercial terms set out in Annex 5.
- c) **Reproduction for incorporating into ISO members' products:** ISO members can incorporate content from ISO publications in their own products but they must pay a royalty fee to ISO on the sales of these products, and must meet with the other terms and conditions set out in Annex 5.
- d) **Reproduction of ISO Standards as national adoptions:** Members may adopt ISO publications as national publications in accordance with ISO Guide 21-1:2005. National adoptions may be sold without payment of a royalty to ISO if the adoption is by the republication method (see Clause 7 below). ISO Members must be clear on the difference between ISO standards and national adoptions.
- e) **Reproduction of national adoptions in ISO member's products:** Members can incorporate content from national adoptions in their own products and sell it on their own commercial terms without payment of a royalty to ISO. When these products include content from national adoptions identical to ISO standards, this content must be clearly identified and marketed as a national publications.
- f) **Reproduction of other works:** The ISO Central Secretariat may agree to other works and other intellectual property being reproduced and used by members on a royalty free basis in order to promote standardization and standards use, but members must always seek the permission from the ISO Central Secretariat and acknowledge ISO as the owner of the copyright and the originator of the works.

## 6.2 Reproduction by third parties

Provided that ISO's copyright is adequately protected, ISO members can grant third parties a sub-licence to reproduce ISO standards as follows:

- a) **Networking of ISO standards:** ISO members may issue sub-licences to third parties in their national territories which allow them to reproduce ISO standards in their internal networks for their own internal use. ISO members may issue these sub-licences on their own commercial terms, but the royalties the members pay to the ISO Central Secretariat must be calculated in accordance with Annex 5. ISO members must ensure that third parties always supply the information they will need to calculate this royalty.

Requests received by the ISO Central Secretariat will be referred to the ISO member in whose territory the third-party has its headquarters, unless that ISO member has told the ISO Central Secretariat that they do not want to perform this role. The ISO Central Secretariat will be responsible for issuing sub-licences in territories without ISO members. When the ISO Central Secretariat grants such sub-licences, the terms and conditions will be in accordance with Annex 7.

- b) **Reproduction for other internal use:** ISO Members may issue licences to third parties in their national territories which allow them to reproduce ISO publications, or parts of ISO publications, for internal uses such as distribution at a meeting or incorporation in internal documents and company manuals. ISO members may issue these sub-licences on their own commercial terms, but the royalties the members pay to the ISO Central Secretariat must be calculated in accordance with Annex 5. When the ISO Central Secretariat grants such sub-licences, the terms and conditions will be in accordance with Annex 8.
- c) **Reproduction for commercial purposes in a single territory:** ISO members may issue licences to third parties to reproduce ISO publications, or parts of ISO publications, for



incorporation in products for sale, such as books or software. The terms and conditions on which these licences are issued will be in accordance with Annex 8. ISO members may issue these licences on their own commercial terms but the royalty the members pay to the ISO Central Secretariat must be calculated in accordance with Annex 5.

Requests received by the ISO Central Secretariat will be referred to the ISO member in the relevant territory, unless that ISO member has told the ISO Central Secretariat that they do not want to perform this role. All licences issued by the ISO Central Secretariat will be in accordance with Annex 8.

- d) Reproduction for commercial purposes in more than one territory:** The ISO Central Secretariat will approve requests from an ISO member to enter into agreements with third parties for a license to reproduce ISO publications, or parts of ISO publications, in products for sale in the territories of more than one ISO member. Such agreements must be reported in accordance with Annex 6. All licences issued by the ISO Central Secretariat will be in accordance with Annex 8. The ISO Central Secretariat will keep the CPSG informed of such agreements.

Guidelines for preparing licence agreements can be provided by the ISO Central Secretariat, and ISO members must report these agreements in accordance with Annex 6.

## **7 Distributing and selling ISO publications, metadata and other works**

### **7.1 Distribution by the ISO Central Secretariat**

The role of the ISO Central Secretariat includes the following:

- a) Supplying ISO publications and metadata to ISO members and distributors:** The ISO Central Secretariat will supply all ISO publications and their associated metadata to ISO members or their distributors in a prompt and efficient manner.

Electronic copies of ISO publications and metadata will be made available to ISO members from the ISOSTD server, but they must keep to the terms and conditions for its use. ISO members can ask for electronic copies to be delivered on media such as DVD or hard drive but must pay the full cost (supplies, production costs, mailing) to the ISO Central Secretariat of providing this service.

ISO publications provided as hard copy or on transportable media will be sent by ordinary post, free of any mailing charges. ISO members or their distributors can ask for a faster delivery by courier or other similar services but will have to pay the full cost of the delivery service they chose.

The ISO Central Secretariat will make ISO publications and metadata available to any appointed distributors or licensees in accordance with the terms and conditions specified in their contracts. If a distributor or licensee asks for access to the ISOSTD server, they must keep to the terms and conditions of its use.

- b) Distribution of ISO publications to end-users:** The ISO Central Secretariat will maintain an efficient sales and distribution service for all ISO publications to end users in all parts of the world. It has a key role in promoting and distributing ISO publications in territories with no ISO member, or in territories where the ISO member is not willing, or able, or authorized to do so. This may be done through ISO Central Secretariat's own sales service or by appointing distributors or licensing the reproduction and distribution of ISO publications to third parties operating in these territories.

The ISO Central Secretariat also has a role in responding to enquiries from all over the world

and in serving all those end users who choose to purchase directly from ISO.

The ISO Central Secretariat will keep a record of all sales made to end users in the territories of ISO members, and will inform the users about the sales services available from their local ISO member. If an ISO member wants to receive a report of ISO Central Secretariat's sales in its national territory, they will be sent all the product and customer information that ISO is allowed to supply under the laws of Switzerland.

Each ISO member will receive a share of the revenue the ISO Central Secretariat receives from sales, in accordance with Annex 4.

- c) **Marketing support:** The Secretary General will set the price of ISO publications in all formats and on all media. These prices will be reviewed at least once a year and ISO members will be informed of any changes at least 60 days before they come into force.

The ISO Central Secretariat will also produce promotional material to help in the marketing of ISO publications and will supply ISO members with all the metadata relating to ISO publications. ISO members can reproduce these metadata, free of charge, for the purpose of promoting sales of ISO publications in their national territories or in products and services that promote the use of ISO publications.

## 7.2 Distribution by ISO members

ISO members have the primary responsibility for the sale and distribution of ISO publications in their national territories, either in their original form or as translations or national adoptions.

- a) **Selling ISO publications:** ISO members can sell ISO publications in accordance with this Policy in two ways: they can buy ISO publications in hard copy or in electronic format from the ISO Central Secretariat and resell them to end users, or they can reproduce them from originals supplied by the ISO Central Secretariat. The discounts that members get on purchases for resale and the royalties they have to pay on the sale of reproductions are set out in Annex 5.
- b) **Selling translations of ISO publications:** ISO publications are prepared in up to three official languages, English, French and Russian but, with the agreement of the ISO Council, the ISO Central Secretariat also prepares translations of some ISO publications in other widely-spoken languages (for example, Spanish or Arabic). ISO members can sell all these different language versions on the same commercial terms.

ISO members can also translate ISO standards into other languages when they publish them as national adoptions. In this case, the copyright in the translations is shared between ISO and the ISO member concerned but the terms for selling them are the same as for any other national adoptions.

ISO Members may also prepare translations of ISO standards without adopting them, or prepare translations of ISO publications other than standards, into other languages. These language versions are not published by ISO Central Secretariat but the copyright in them is shared between ISO and the member that makes the translations. A royalty must be paid to ISO on the sale of these translations, in accordance with Annex 5.

ISO members have the primary right to translate ISO publications into their own national languages. Any request from a third party to prepare translations of ISO publications into a language that is not an official language of ISO should be referred to the most appropriate ISO member. If there is any doubt about which is the most appropriate ISO member, the request should be referred to the ISO Central Secretariat for a decision.



c) **Selling national adoptions:** ISO members can only adopt ISO standards as national publications by the following two methods, in accordance with ISO Guide 21-1:2005:

- **Republication method:** in which the ISO member republishes the text of the ISO standard and adds its own national foreword, its own national branding on each page and its own copyright notice, so that it is clearly identified as a national publication, but they must include an indication of the origin of the text, in accordance with Annex 4. When an ISO member adopts by the republication method, the national adoptions may be sold without a royalty being paid to ISO, but all other parts of this Policy still apply.
- **Endorsement method:** in which the ISO member announces that the ISO standard now has the status of a national publication and prepares an endorsement notice. When the ISO member adopts an ISO publication by the endorsement method, customers asking for the national publication must be supplied with the ISO publication together with the national endorsement notice. Therefore royalties must be paid on the sale of the ISO standard in accordance with Annex 5.

ISO members adopting ISO standards by either method must protect copyright in accordance to the rules in clauses 4 and 5 of this Policy.

d) **Marketing ISO publications and national adoptions:** ISO members must not actively market ISO publications in the territories of other ISO members unless they have written permission from those ISO members to do so. For the purposes of this policy, active marketing does not include advertising or selling ISO publications on a public website, but does include any other kind of distribution of unsolicited promotional material directed to customers in the territories of other ISO members.

If an ISO member receives an order from a customer in the territory of another ISO member it must deal with that order in accordance with the requirements of local competition laws.

### 7.3 Distribution by appointed distributors

- a) **National distributors appointed by ISO members:** ISO members can appoint distributors to promote the sale of ISO publications and national adoptions in their national territory on their own terms but must make sure that their distributors keep to the relevant terms of this Policy.
- b) **National distributors appointed by the ISO Central Secretariat:** The ISO Central Secretariat can appoint distributors to promote the sale of ISO publications in a national territory where there is no ISO member, or in territories where the ISO members inform the Secretary General in writing that they agree to the appointment of distributors. These distributors must keep to the relevant terms of this Policy.
- c) **Trans-national distributors appointed by the ISO Central Secretariat:** The Secretary General, in consultation with the CPSG and with the approval of the ISO Council, may appoint distributors to promote the sale of ISO publications in more than one national territory, or license the reproduction of ISO standards in third party products for sale in more than one national territory.

## **8 Reporting**

ISO Members must report to ISO Central Secretariat all sales of ISO publications, reproductions and translations, together with all reproduction agreements with third parties, whether for internal use or commercial purpose, in accordance with Annex 6.

At the request of the ISO Council, members must also report on sales of national adoptions, to the best of their abilities, to help with the gathering of marketing information of importance to ISO and ISO members.

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## LIST OF ISO PUBLICATIONS

The table below lists all ISO publications. They are grouped into four different categories to distinguish between ISO standards and related products, products prepared by the ISO Central Secretariat and documents jointly published or jointly distributed.

	① ISO standards	② ISO derived products and packages	③ ISO Central Secretariat products	④ Partnership publications
<b>Definition</b> (for the purpose of ISO POCOSA 2012)	Standards developed within the ISO standardization process in accordance with the procedures of the ISO/IEC Directives, including their amendments and technical corrigenda, at all stages of their development.	Publications derived from or made up of ISO standards prepared and published by the ISO Central Secretariat.	Informational products prepared and published by the ISO Central Secretariat, targeted at ISO members, potential users of ISO standards and the general public.	Publications jointly developed and published by ISO and Standards Developing Organisations (SDOs) under the terms of specific agreements which may include particular conditions for their distribution and exploitation.
<b>Examples and type of products</b>	<ul style="list-style-type: none"> <li>Working draft (WD)</li> <li>Committee draft (CD)</li> <li>Draft international standards (DIS)</li> <li>Final draft international standards (FDIS)</li> <li>ISO standards</li> <li>Publicly available specification (ISO/PAS)</li> <li>Technical specification (ISO/TS)</li> <li>Technical report (ISO/TR)</li> <li>International workshop agreement (IWA)</li> <li>Technology trends assessment (TTA)</li> <li>ISO guides</li> </ul>	<ul style="list-style-type: none"> <li>ISO standards handbooks</li> <li>ISO compendia</li> <li>Compilation of standards</li> </ul>	<ul style="list-style-type: none"> <li>Implementation handbooks and guidelines</li> <li>Manuals</li> <li>Promotional publications and material in all type of support</li> <li>ISO Focus+</li> </ul>	

## COPYRIGHT NOTICES FOR ISO PUBLICATIONS

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### 1 Scope

ISO publications, particularly ISO standards, drafts and national adoptions, must not be circulated without a proper copyright notice. The copyright notice to use depends on the type of publication and its status. The acceptable copyright notices are as follows.

### 2 Abbreviated notice on ISO standards and drafts

For ISO standards and drafts, an abbreviated copyright notice should be on each page as follows:

© ISO [year] – All rights reserved
Or
© ISO/IEC [year] – All rights reserved

Such notices also apply to all extracts or parts of ISO publications, including ISO standards, drafts and national adoptions, regardless of their size, incorporated into any type of product or service developed by ISO members, the ISO Central Secretariat or authorized third parties.

### 3 Copyright notice on ISO standards and drafts

The following copyright notice must appear on each published ISO standard, draft international standard (DIS), final draft international standard (FDIS), as well as working and committee drafts:

<p>© ISO [year]</p> <p>All rights reserved. Unless otherwise specified, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the internet or an intranet, without prior written permission. Permission can be requested from either ISO at the address below or ISO's member body in the country of the requester.</p> <p>ISO Copyright Office CP 56 • CH-1211 Geneva 20 Phone: + 41 22 749 01 11 Fax: + 41 22 749 09 47 Email: <a href="mailto:copyright@iso.org">copyright@iso.org</a> Website: <a href="http://www.iso.org">www.iso.org</a> Published in Switzerland.</p>
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### 4 Other copyright notices allowed on drafts

If a draft is a direct reproduction of copyrighted material produced by another organization that develops standards (for example, in the case of parallel development or the proposed use of existing standards) the following copyright notice can be used.

© ISO/[other standards developing organization] [year]

This ISO/[other standards developing organization] document is a Draft International Standard and is copyright-protected by ISO and [other standards developing organization]. Unless otherwise specified, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the Internet or an Intranet, without prior written permission.

Requests for permission to reproduce should be addressed to ISO at the address below or ISO's member body in the country of the requester. In the [country of origin of the other standards developing organization], such requests should be sent to [other standards developing organization].

ISO Copyright Office  
CP 56 • CH-1211 Geneva 20  
Phone: + 41 22 749 01 11  
Fax: + 41 22 749 09 47  
Email [copyright@iso.org](mailto:copyright@iso.org)  
Website: [www.iso.org](http://www.iso.org)

[Indicate the full address, telephone number, fax number and email address, as appropriate, of the Copyright Manager of the other standards developing organization.]

Reproduction may be subject to royalty payments or a licensing agreement. Offenders will be prosecuted for infringement before civil and criminal courts.

When the approved ISO standard is published by the ISO Central Secretariat, it must carry only the relevant ISO copyright notice.

## 5 Copyright notices on national adoptions or translations of ISO standards

When an ISO member adopts an ISO standard as a national standard, or translate an ISO Standards, the ISO copyright notice can be replaced by the ISO member's own copyright notice in accordance with the rules of that member in that country. However, the copyright notice should mention the origin of the work as follows, for example, for the national adoptions:

© ISO [year] – All rights reserved  
© [acronym of the ISO member having prepared the national adoption or the translation] [year] for the national adoption.

Or as follows, for example, for direct translations of ISO standards:

© ISO [year] – All rights reserved  
© [acronym of the ISO member having prepared the national adoption or the translation] [year] for the translation.

## **DIRECTIVES FOR DISTRIBUTING ISO STANDARDS AND DRAFTS IN THE DEVELOPMENT PROCESS**

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### **1 Scope**

This annex explains the rules for distributing ISO standards and their drafts, including working drafts and committee drafts, as well as other documents produced during the process of developing standards.

### **2 General principles**

Although ISO publications are copyright-protected, we encourage the distribution or reproduction, free of charge, of ISO standards and drafts needed to prepare other standards, but only within the ISO standards development process or the process of preparing national adoptions of ISO standards. However our copyright must be respected, and documents should only be distributed to:

- ISO members (specifically members on a given technical committee);
- delegates accredited by ISO members;
- liaison organizations on ISO committees;
- experts appointed to ISO working groups; and
- members of national committees mirroring an ISO technical committee and their sponsoring organizations (for example, trade associations, government departments, etc.).

Considering that many ISO members and the ISO Central Secretariat receive an income from selling ISO publications, including drafts, anyone with access to ISO standards and drafts must make sure that those documents are not distributed contrary to the terms of ISO POCOSA. If anyone not involved in developing standards wants to reproduce all or part of any ISO standard or draft, they must get written permission from the ISO member in the country in which they are located or from the ISO Central Secretariat.

We encourage the use of public networks, such as the internet, when developing standards, as long as that use is strictly limited to identified users and follows the rules in this document (unless the ISO Council agrees otherwise).

### **3 Directives for distributing standards**

The paragraphs below explain the rules to be followed when distributing ISO standards and drafts. The provisions of the core document of ISO POCOSA, particularly Clause 4, also apply. The status of modified versions of technical documents created in the form of contributions from a national body or a designated expert must be clearly identified, with all proposed revisions clearly marked.

#### **3.1 Distribution for developing standards**

As explained above, ISO standards and their drafts may be reproduced and distributed for the purpose of further standardization. For example, a standard being developed by ISO technical committee A may give a reference to another ISO standard, and that would give members of ISO technical committee A the opportunity to review the ISO standard in question. In such a context, the ISO standard can be reproduced and distributed free of charge to named individuals entitled to receive the text because they are part of the ISO system. However, our copyright must be



respected and restrictions on further distribution must be specified, in particular through using a watermark.

### **3.2 Distribution for public comment**

The standardization process may include a public-enquiry stage where draft standards need be made available for all interested parties to comment on. In this case, the general public can have free access to drafts. If this access is given through the internet, there must be a registration process to prevent people from getting direct access to these drafts through a simple internet search. Members may also offer access to draft standards through blogs, wikis and so on. In this case a registration process is not necessary to access the draft standard but it should be ensured that people cannot download the entire standard (for example, access in PDF or Word format is not permitted). In all cases, our copyright must be respected and restrictions on further distribution must be specified, in particular through using a watermark.

## **4 Other information linked to the developing standards**

### **4.1 Reports of meetings and resolutions**

Reports and resolutions of meetings must be made widely available to the experts on any ISO technical committee, subcommittee or working group. A distinction must be made between reports prepared for public information and confidential reports which quote specific comments from experts. Confidential reports should be protected by passwords.

### **4.2 Project-management information**

Project-management information stored in the ISO Central Secretariat database should only be accessible to authorized people and therefore must be protected (for example by passwords).

### **4.3 Public information and administrative documents**

Public information (for example, ISO/IEC Directives, press releases and so on) and administrative documents (for example, work programmes, annual reports, meeting calendars, document registers, meeting notices and agendas) may be made available to the public, free of charge, through the internet.



## PAYMENTS ISO MEMBERS RECEIVE ON THE SALE OF ISO PUBLICATIONS IN THEIR TERRITORY (RETROCESSIONS)

ISO members will receive a commission on any sale of ISO publications in their territory. The payment they receive is a share of the revenue the ISO Central Secretariat receives as follows:

Category of ISO publications	Revenue from orders received at the ISO Central Secretariat	Revenue from orders received through the ISO store on our website	Revenue received from third parties (licensees)	Revenue received from trans-national distributors
<b>1</b> ISO standards	<b>30%</b> of the ISO list price for orders received from end-users in the member's territory.	<b>60%</b> of the ISO list price for orders received from end-users in the member's territory.	<b>50%</b> of the copyright fee paid by a third party, in proportion to the territories concerned.	<b>50%</b> of the copyright fee paid by trans-national distributors, in proportion to the sales made in the member's territory.
<b>2</b> ISO-derived products and packages				
<b>3</b> ISO Central Secretariat products	The level of payment is set out in specific distribution agreements with the ISO member concerned.			No payment is made.
<b>4</b> Partnership publications	As agreed with the partner.			

## DISCOUNTS AND ROYALTY FEES

### 1 Discounts

The ISO Central Secretariat will supply ISO publications to ISO members, which they may sell, at a discounted price.

For ISO standards, ISO members will benefit from a discount of 50% on the current ISO price list. No bulk discount will apply.

For ISO-derived products and packages, as well as ISO Central Secretariat's products, the ISO member will benefit from a discount of 30% on the current ISO list price. Bulk discounts are available in line with the following table.

Number of copies	Discount
1 to 10	30%
11 to 25	35%
26 to 50	40%
51 to 100	45%
101 to 200	50%
201 to 300	55%
301 to 500	60%
501 or more	Quoted separately

### 2 Royalty fees

The royalty fees ISO members must pay to the ISO Central Secretariat for selling reproductions or translations of ISO publications in their territory are indicated in the table below. It has to be noted that the ISO members have to pay any tax due on royalty payments they make. If tax is due, ISO members must work out the royalty fee in line with the percentages set out below, and the tax on that payment, and pay the total to the ISO Central Secretariat.

# Annex 5 to ISO POCOSA 2012

Category of ISO publications	Royalties for selling reproductions of ISO publications	Royalties for selling translations of ISO publications	Royalties for the reproduction, in electronic form or printed copy, by third parties	Royalties for selling publications developed by ISO members and incorporating ISO standards
<b>1</b> ISO standards	For ISO standards other than working drafts, committee drafts, draft international standards and final draft international standards:  <b>30%</b> of the <b>ISO list price</b> for each copy reproduced  For working drafts, committee drafts, draft international standards and final draft international standards:  <b>30%</b> of the <b>net sales revenue</b> for each copy reproduced	  <b>20%</b> of the <b>ISO list price</b> of the original ISO standard	For electronic reproductions to be distributed in a company's internal network:  <b>30%</b> of the royalty fee worked out in line with annex 7  For printed reproductions or electronic reproductions distributed externally:  <b>30%</b> of the royalty fee worked out in line with annex 8	<b>30%</b> of the net revenue, in proportion to the ISO material included in the publication or,  ISO members can also sign a license agreement with the ISO Central Secretariat.
<b>2</b> ISO-derived products and packages	Does not apply	<b>20%</b> of the <b>ISO list price</b> of the original ISO publication	Does not apply	Does not apply
<b>3</b> ISO Central Secretariat products		Does not apply	Does not apply	Does not apply
<b>4</b> Partnership publications		Does not apply	Does not apply	Does not apply



## REPORTING SALES OF ISO PUBLICATIONS AND NATIONAL ADOPTIONS

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### 1 Objectives

The objectives of us collecting information on ISO members' sales of ISO publications, and translations and national adoptions of ISO standards, are as follows.

- To allow us to work out and control royalty payments that ISO members need to pay to the ISO Central Secretariat;
- To evaluate the total take-up of ISO publications and their national adoptions and so monitor our performance against the ISO strategic plan; and
- To identify and analyse market trends.

The ISO Central Secretariat will process all the information received and will share it with ISO members to give them a better knowledge of the volume and geographic distribution of sales.

An Excel template providing more detailed examples of the information ISO members must send to the ISO Central Secretariat, and the format the information must be in, is available from the ISO Central Secretariat. Members can use the template to report sales.

### 2 Quarterly reports on sales of ISO publications by members

At the end of March, June, September and December, ISO members must report on, and work out the royalties they need to pay to the ISO Central Secretariat for their and their distributors' sales of reproductions of ISO standards.

#### 2.1 Summary of royalties paid to the ISO Central Secretariat

Members must include in their reports sales information related to the different categories of royalties paid to the ISO Central Secretariat as follows.

Category 1.1	Reproduction of individual ISO standards in hard copy and in electronic form
Category 1.2	Reproduction of individual ISO draft standards (working drafts, committee drafts, draft international standards and final draft international standards) in hard copy and in electronic form
Category 1.3	Network licensing in line with annex 7
Category 1.4	Reproduction of ISO standards in hard copy or electronic form (except over internal networks) by third parties in line with annex 8
Category 1.5	Reproduction of ISO standards in national publications
Category 1.6	Sales of translations of ISO standards
Category 1.7	Sales of translations of ISO publications other than ISO standards

## **2.2 Format of information to be provided by ISO members**

We prefer ISO members to use the Excel template for collecting and reporting information, but any other widely used format can be used. If another format is used, the following rules apply.

- The first line in the spreadsheet should contain the name of the fields of information;
- The exact official ISO reference number for referring to ISO standards must be used;
- There should be one line of the spreadsheet for each ISO standard reference number included in the report;
- The two-character codes given in ISO 639 to indicate the language should be used when reporting on translations; and
- Information not asked for, and formatting such as borders, shading, colours and so on, must not be added to the spreadsheet – it should remain as basic as possible.

ISO members should also state their organization's acronym in the reports, as well as the quarter and the year covered in each of the tables provided. (The first quarter is 1 January to 31 March, the second quarter is 1 April to 30 June, the third quarter is 1 July to 30 September, and the fourth quarter is 1 October to 31 December.)

## **3 Yearly reports on sales of national adoptions of ISO standards**

The information ISO members must provide in their yearly reports includes the following:

- The number of ISO standards adopted as national standards, including European standards derived from ISO standards (for example EN ISO);
- The total revenue from selling national adoptions of ISO standards and the total number sold;
- Titles of the 20 top-selling national adoptions, the number of each sold, and the percentage they represent of total sales of national adoptions;

## **4 Yearly reports on sales of total sales of standards and related products**

Each year ISO members must report on their total sales of standards and related documents, including drafts, national and regional standards, national adoptions of ISO and IEC standards, ISO and IEC standards, and standards from other standards organizations.





## **RULES FOR PUTTING ISO STANDARDS ON INTERNAL NETWORKS**

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### **1 Scope**

More and more companies want to have ISO standards available in electronic format on their own company networks, and give access to these documents to some, or all, of their employees at different locations.

The rules given in this annex determine the copyright fees to be paid by a company receiving this service through a licence agreement. ISO members can negotiate licence agreements with companies, but they must use these rules for calculating the royalty to be paid to the ISO Central Secretariat. The royalties will be a percentage of the copyright fee as set out in Annex 5.

If an ISO member needs some flexibility in applying these rules, they should consult the Secretary General.

### **2 General provisions of a licence agreement with a company**

#### **2.1 Supplying the ISO standards asked for**

The ISO standards required can be provided to the company online or in on media such as CD-ROM, DVD, hard disks, etc.

#### **2.2 Updating service**

The ISO member must offer an updating service under which relevant new and revised ISO standards will be provided in a format and at a frequency agreed with the company.

#### **2.3 Copying ISO standards in the collection**

The ISO member issuing the licence agreement decides rights and conditions for the company concerned to make paper copies of the ISO standards. However, these copies must be for internal use only and must not be distributed or sold outside the company.

#### **2.4 Duration of the licence agreement**

The licence agreement must be for at least one year. When the licence agreement ends, the company must confirm in writing, to the Secretary General or the ISO member granting the licence, that it has destroyed all files delivered and any printed copies produced under the licence agreement. The company's right to keep one electronic or paper copy of each ISO standard in the collection for archiving purposes must be covered by a specific clause in the licence agreement and a fee for those copies should be paid on top of the copyright fee.

### **3 Elements included in the calculation of the copyright fee**

ISO members are responsible for setting the price for their licence agreements. However, they have to make sure that their pricing policy reflects a reasonable market value. When working out the annual copyright fee a company will have to pay, the following elements need to be considered.

#### **3.1 Number of simultaneous network users and sites**

The number of simultaneous users is the number of employees in a company that will access the collection at the same time.

A company may be located in several sites in one national territory or in several national territories. For the purpose of working out the copyright fee, each site on the network counts as an extra simultaneous network user.

- For organizations with 10'000 or more employees located in one national territory, the calculation should be based on a minimum of five simultaneous network users and sites.
- For organizations with 10'000 or more employees located in more than one national territory, the calculation should be based on a minimum of 10 simultaneous network users and sites.

### 3.2 Number of ISO standards

Most companies want to choose the standards they would like to have in their collections, but ISO members can create their own collections based, for example, on the ICS classification or by technical committee.

### 3.3 Total value of the collection

The value of the collection is the total of the individual prices of the standards, according to the most recent ISO price list. However, if a collection includes more than six ISO standards, the ISO member can set a value by multiplying the average price of an ISO standard by the number of standards in the collection. The average price of a standard is set by the ISO Central Secretariat.

## 4 Calculating the copyright fee

ISO members work out the annual copyright fee using an Excel spreadsheet which is part of this annex. The elements described above (number of network users, number of standards and value of the collection) must be entered into the spreadsheet as shown in the following example.

The example gives the annual copyright fee (CHF 72 793,35) which ISO members should use to work out the royalties to be paid to the ISO Central Secretariat for a company giving one simultaneous user in one of its locations access to a collection of 16'500 ISO standards:

Annex 7 to POCOSA 2005 - Excel spreadsheet for calculation of copyright fee for granting copyright exploitation rights for internal use of ISO standards in electronic format	
Please enter the following data	
A. Total number of simultaneous network users and number of sites (minimum = 2)	2
B. Number of ISO standards in the collection	16 500
C. Value of the collection	CHF 1 155 000
Yearly annual copyright fee (including maintenance) for 2 users and/or sites	
CHF 72 793.35	

### 4.1 Maximum annual copyright fee

If the total number of simultaneous network users and sites the organization specifies is more than 30, the copyright fee the company must pay is equivalent to the copyright fee for 30 simultaneous network users and sites.

### 4.2 Additions to the collection

The company may want to change the scope of the licence during the year. This might mean increasing the number of standards in the collection or extending the access to more simultaneous network users or sites. In these circumstances the company must be invoiced for the difference between the copyright fee it has already paid and the new copyright fee.

## **5 Reporting to the ISO Central Secretariat**

In line with Annex 6, even if an ISO member uses their own method of working out the royalty to be charged to a company, they must make sure that they have the information they need to work out the royalty they have to pay to the ISO Central Secretariat.



## **RULES FOR THIRD PARTIES REPRODUCING ISO STANDARDS OTHER THAN FOR ON AN INTERNAL COMPANY NETWORK**

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### **1 Scope**

These rules relate to the copyright fee a third party must pay for reproducing ISO standards for internal use and for commercial purposes. They provide flexible options to end-users willing to reproduce the entire text, or parts, of standards for various use except the sharing through a company's internal network which is covered by Annex 7. As a general rule, the fee should be based on the price charged for the printed version of the relevant ISO standard.

### **2 Printing copies for internal use**

For the reproduction of ISO standards in paper format, such as distribution at meetings, the following principles apply.

- Only complete ISO standards can be reproduced;
- Only purchased copies of original ISO standards can be reproduced, the enquirer must confirm that they bought the original standard;
- The front page of each copy must carry an acknowledgement such as *Copied by (name of company) with the permission of ISO* or *Copied by (name of company) with the permission of (name of ISO member) on behalf of ISO*;
- The copyright fee the third party must pay is the price shown in the most up-to-date price list multiplied by the appropriate percentage shown in the table in table 7, multiplied by the number of copies made;
- The ISO Central Secretariat may agree on discounts for bulk orders.

### **3 Reproducing in internal company documents**

For incorporating ISO standards or parts of ISO standards in internal company documents such as manuals, whether in hard copy or on an internal company intranet, the following rules apply:

- The document must carry an acknowledgement, as explained above;
- The royalty fee charged must be an appropriate proportion (considering the number of pages being reproduced) of the price shown in the most up-to-date ISO price list multiplied by the appropriate percentage shown in table 7 below, multiplied by the number of copies being distributed, or the number of users with online access to the material being reproduced;
- The ISO Central Secretariat may agree discounts for bulk orders.

### **4 Reproducing for commercial purposes**

For reproducing ISO standards in publications or products to be sold by book publishers or software developers, the following rules apply:

- The total number of pages of the standard reproduced must not be more than 25% of the book or product the material is reproduced in;
- Permission to reproduce should normally not be given during the first six months after the ISO standard is published;

- The royalty fee charged must be an appropriate proportion (considering the number of pages being reproduced) of the price shown in the most up-to-date ISO price list multiplied by the appropriate percentage shown in table 7 below, multiplied by the number of copies sold or leased, or the number of user licences sold or leased;
- The ISO Central Secretariat may agree discounts for bulk orders.

## 5 Requests from educational institutions

We want to promote the use of ISO standards in educational institutions and the ISO Central Secretariat or the ISO member concerned will decide the royalty fee to charge, even if a royalty rate is recommended in the table below. A condition however is that access to ISO standards is not provided free of charge.

The ISO Central Secretariat or the ISO member concerned will decide whether the institution concerned is legitimate and whether the purpose of the reproduction is consistent with ISO's objectives. They will issue licences specifying the rights given to the educational institution, and the appropriate controls to prevent a misuse of ISO publications. ISO members must pay to the ISO Central Secretariat 30% of any income they earn from these licences.

Educational institutions may also act as commercial publishers and may ask for permission to reproduce ISO standards in publications or products they sell. Such requests must be treated in the same way as requests for any other commercial purpose, as explained in clause 4 above.

## 6 Other requests

Any request not covered in this annex must be referred to the ISO Central Secretariat so that appropriate terms can be agreed.

## 7 Table of royalty rates

Requests	Royalty rate
For internal distribution or use	20%
From educational institutions	20%
For commercial purposes	50%

